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ABSTRACT

There is currently a renewed emphasis on planning stemming largely from the accountability movement in education. The accountability factor suggests that current and future educational planning could perhaps differ from past planning. These differences could possibly manifest themselves in a wider inclusion of lay persons and groups in the development, implementation, and evaluation of educational plans and programs; more attention to planning in light of specified anticipated outputs or goals; plans for specified time periods grounded in a more comprehensive information base; and a professional assumption of responsibility for the effectiveness of such plans and programs. The objectives of this handbook are to promote comprehensive planning in local school districts, point out the benefits of planning, orient the reader to the planning process, and describe specific procedures that might be used in the various phases of the planning process. A list of references arranged selectively under topics pertinent to the document discussion is included. (Author/WM)

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PLANNING: GETTING FROM HERE TO THERE

A Handbook for Local School Districts

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Developed under the auspices of PROJECT KANSAS 76, an EPDA/USOE sponsored cooperative project designed to promote educational leadership in Kansas.

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CONTENTS

Preface i

Introduction iii

Planning: What Is It? 1

Planning: Why Do It? 3

Planning: How Do You Do It? 6

Establish A Planning Team 6

Plan for Planning 7

Identify and Prioritize Goals 7

Do A Needs Assessment 9

Measuring Need: Three Alternatives 10

Develop Program and Instructional Objectives 13

Develop Program Alternatives and Improvements 17

Implement Selected Program Alternatives and Modifications 22

Maintain Programs and Evaluate Effectiveness 24

Recycle 26

Planning: What Are Some Procedures? 27

The Phi Delta Kappa Model 28

The Modified QEPS Model 29

The School Image Descriptive Questionnaire 31

Planning: Why Does It Fail? 34

Epilogue 36

References 38

PREFACE

Educators have always planned. They have built facilities, added staff, and modified programs on the basis of pressing needs and visions of the future. Very often planning has been done hurriedly, with a very shaky information base, and under the press of intense community, state, and sometimes federal pressures. Despite these conditions, educators have generally been good planners and have provided those they serve with appropriate programs and facilities.

There is currently a renewed emphasis on planning which stems largely from the accountability movement in education. The accountability factor suggests that current and future educational planning will perhaps differ from past planning in the following important respects:

* Wider inclusion of lay persons and groups in the development, implementation, and evaluation of educational plans and programs.
* More attention to planning in light of specified anticipated outputs (goals).
* A more comprehensive information base upon which to develop plans and programs.
* Plans for specified time periods.
* Professional assumption of responsibility for the effectiveness of educational plans and programs.

In recognition of these factors, this Handbook is an attempt to provide immediate, specific, and useful assistance to harried school district personnel who have planning responsibilities. The Handbook is admittedly over-simplified. Although planning is a very complex process, it is dealt with here in very straightforward, uncomplicated language. The intent is to provide local school personnel with a planning vehicle they can use or adapt and not with a lengthy treatise incorporating the sophisticated language of the expert planner.

The ideas, procedures, and viewpoints described herein are totally the responsibility of the author. They flow, however, from innumerable interactions and discussions with professional colleagues, personal reading and professional growth activities, experience in school districts, institutions of higher education and the state education agency, and undoubtedly a host of other factors which have contributed unwittingly to this synthesis. The freedom to integrate all of these derives from the structure and intent of Project Kansas 76, an EPDA/USOE sponsored leadership development project which assumes that leadership development must necessarily incorporate many of the dimensions of sound planning procedures.

Topeka, Kansas
January, 1974

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INTRODUCTION

Planning is currently an important catchword in the language of education. Along with "needs assessment" and "accountability", it perhaps commands more attention than do such other current phrases as "open education", "flexible modular scheduling", "individualized instruction", and "team teaching". And this is as it should be since these latter phrases are in reality proposed solutions which are often implemented in the name of innovation without any adequate identification of the problem they are intended to solve. Planning on the other hand is a process which can identify problems, suggest feasible program directions, and generate alternative solutions from which planners can rationally choose. Thus it is a much broader term and provides the context within which proposed solutions like those above can be considered and judged.

The objectives of this Handbook are to promote comprehensive planning in local school districts, to point out the benefits of planning, to orient the reader to the planning process, and to describe specific procedures which may be used in the various phases of the planning process. The Handbook is organized into sections, each having to do with a question which is basic to the nature of planning. The questions considered are:

* Planning: What Is It?
* Planning: Why Do It?
* Planning: How Do You Do It?
* Planning: What Are Some Procedures?
* Planning: Why Does It Fail?

If systematic planning is initiated after reading the Handbook, then one of its objectives will have been realized. If planning is already under way and the Handbook is in some way helpful, so much the better.

PLANNING: WHAT IS IT?

This is a hard question to start with. One of the reasons is that the term is often used synonymously with needs assessment, accountability, curriculum development, goal identification, and a host of others.

Additionally, there are a number of definitions of planning in the literature which have found wide acceptance. Some of the more widely known definitions are:

Koontz: Planning is the conscious determination of courses of action designed to accomplish purposes.[1]

Dror: Planning is the process of preparing a set of decisions for action in the future, directed at achieving goals by optimal means.[1]

Anderson: To plan is to determine a forward program for governing the future affairs of an enterprise.[1]

These are all nice definitions. Notice that they all relate to problem-solving, decision-making, critical thinking and other processes we have all heard of before. Rationality is an underlying theme. Two other definitions of planning which are somewhat simpler than those above are posed by Albright and the writer.

Albright: Planning is thinking and doing something about the future.[1]

Sarthory: Planning is a process having to do with:
Determining where you want to go.
Determining where you are now.
Developing ways to get from here to there.

Planning Phases

With a little thought one can see that there are identifiable phases or steps inherent in all of these definitions. Very simply stated, some phases of the planning process which seem self-evident are:

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[1] Definitions from Planning in Education. Lexington. University of Kentucky. Bureau of School Services. March, 1972.

* Identify and prioritize goals (where you want to go).

* Look at current program in relation to priority goals (where you are now).

* Identify major discrepancies, gaps - needs (needs assessment).

* Develop program and instructional objectives related to identified needs.

* Develop program alternatives and select those most likely to achieve objectives.

* Implement selected program alternatives.

* Monitor programs and evaluate effectiveness.

* Recycle (the earlier "where you want to go" is now the present and its time to start the process again).

Types of Planning

Before moving on to questions like why plan and how do you do it, we need to be clear that there are different types of planning; that planning can and should touch all aspects of school district operation. Within this context, some types of planning which are apparent in education are:

* Program Planning
* Facilities Planning
* Financial Planning
* Personnel Planning
* Material Supply and Inventory Planning

The phases of the planning process identified earlier apply to each of these types. For instance, it is logical to establish district building program goals, assess the status of existing buildings, develop alternative building plans, etc. Clearly however, facility, financial, personnel, and material planning are subsidiary to program planning and the logical, orderly relationship among these planning types is perhaps best reflected in the following series of questions:

* What kind of program do we want?

* What personnel will that program require?

* What supplies and materials will the program require?

* What facilities will the program require?

* What will be the cost and how do we raise the money?

Levels of Planning

Finally, it is important to note that there are different levels of planning for each type which was identified above. Policy planning emphasizes goals and objectives; what should be. Strategic planning has to do with posing alternate routes for achieving goals; how do we get there? Tactical planning entails identifying specific actions necessary to implement a strategy; what specific tasks must be accomplished? These levels are related in descending order from the general to the specific.

Conclusions

The question "What is planning?" wasn't very easy to answer. A lot of information about the nature of planning has been packed into very few pages. But its been presented in a logical sequence which hopefully has provided a good understanding of the nature of the beast.

Let's turn now to the question, "Why plan?"

PLANNING: WHY DO IT?

Perhaps this question is somewhat easier to answer than the first although two subquestions are really implied. We are really asking:

* What are current conditions which make comprehensive, long range planning feasible and necessary?

* What are the benefits of comprehensive long range planning?

Concerning the first question, some good and obvious reasons for planning are:

* Resources for education are not as abundant as they once were.
* Demands upon and expectations of the schools are being expressed much more vocally.
* People want to know the educational outcomes they receive for the resources they provide.
* There is a great deal of current criticism of schools and school programs.
* To an increasingly greater degree, schools and educators will be held accountable for the effectiveness of what they do.
* Users, supporters, and practitioners are demanding more of a voice in determining how schools are organized and what they do.

I'm sure the reader can identify numerous other factors suggesting the need for planning which I've overlooked. Think of your own community and state contexts for a moment and other reasons will likely leap out at you.

Benefits of Planning

In light of these conditions and situational factors, planning can do a lot for you. Some of the benefits of planning which immediately come to mind are:

* Planning can provide better information to justify what's currently being done.
* Planning can suggest directions for new and modified programs.
* Planning allows you to allocate available resources more effectively.
* Planning can help you identify priorities.
* Planning provides a way to involve users, supporters, and practitioners in meaningful and productive activities.
* Planning can improve decision-making by providing better information.
* Planning can stimulate people to see the big picture over the long haul rather than the narrow, short run snapshot.

Somewhat more specifically, planning can also be helpful in regard to some traditional areas of school operation and management. Once the planning process has helped identify and construct the kind of educational program you want, it can also help you answer these questions:

* What kinds of staff members should we hire? What kinds of skills should they possess?

* How should staff members be oriented and assigned?

* What kinds of in-service activities do we need to insure that staff members possess the skills required by the program?

* How can staff members be evaluated?

* How can we better tie resources to program in our budgeting and accounting procedures?

Conclusion

In closing this section on the why of planning, I'd like to share two statements with you which are taken from different sources. In response to the question "Why plan?", the Colorado Department of Education in a booklet on planning poses the following answer:

> ...To develop a long-range policy and/or operations guide which will maximize the use of available resources for attaining the educational objectives of individuals and society.

Quite a mouthful! An answer to the same question put forth by the North Carolina Department of Public Instruction is perhaps more to the point. In a planning handbook, they respond:

> ... To do a better job of educating children by leading the school staff, students, parents, and community into acceptance of realistic objectives and then attaining them.

Amen!

PLANNING: HOW DO YOU DO IT?

Now things are really getting sticky. Assuming you at this point know something about what it is and what it can do for you, you're probably wondering how you get planning off the ground in your school district. Well, here goes!

If you buy the assumption that everyone and his brother ought to be involved, perhaps the first thing you need to do is to organize to plan in such a way that all appropriate groups are involved in developing a plan to plan. Sound complicated? Not really. All that's being suggested is that the first step in organizing to plan is to:

* ESTABLISH A PLANNING TEAM

The planning team does not do all of the planning but its role is extremely important to the degree of success of the local planning venture. This is true because the planning team coordinates and directs the entire planning effort and leads others through the phases of the process. For this reason, the team should include professional staff members, parents, and students since all of these groups will be involved in one or more steps of the planning process. It is a good idea to include the superintendent and at least one member of the board of education on the team (assuming one district-wide team).

As to size, keep it workable; somewhere between ten and fifteen members is appropriate. Depending on the size of the district, there may be building teams, regional teams, or one district team. The suggestions in this section assume the latter but they can be adapted to the particular situation if planning is done in smaller organizational units.

Plan for Planning

The team's first task is to develop a "plan for planning" which can both provide guidelines for the district planning effort and serve as a standard against which to evaluate the effectiveness of planning activities. The "plan for planning" should deal with the following questions:

* What time period are we talking about for planning? One year? Two? Five? This needs to be specified and agreed upon.

* What type of planning are we doing? Program? Facilities? Personnel? The primary planning emphasis should be clearly understood.

* What are the major milestones of our planning effort? How much time should be allowed for each milestone? How will we know when we've reached each milestone?

* Who should be responsible for what?

* What financial and human resources do we need?

* What are the outcomes we expect of our planning effort? How will we know how well we've achieved them?

Tough questions, certainly. But they need to be answered in the plan for planning so that the planning team can adequately carry out its major responsibility - leading others through the steps of the planning process. The rest of this section will attempt to identify the questions and tasks which face the planning team at each step in the process and suggest alternatives when appropriate.

Identify and Prioritize Goals

Remember we said that the first phase in the planning process is determining where you want to go -- establishing goals. The tasks of the planning team in this phase have to do with deciding what procedures to use to establish goals and who should be involved. More specifically, the team needs to wrestle initially with this question:

* How should we identify and prioritize goals for our district?

Some alternative answers to this question are:

* The planning team develops goals and distributes them to students, parents, and staff for their reactions and suggestions.

* A "goal task force" composed of students, staff, and parents is appointed to do the same thing.

* Utilizing either a mail survey or meetings, students, parents, and staff are asked to identify the major educational concerns and issues of the district as they see them. These are then translated into goals by the planning team.

* Students, staff, and parents are asked to rank existing goal statements in their order of importance. This can be accomplished through a mail survey or in a meeting.

There are doubtless many other ways to identify and prioritize goals and they obviously cannot all be included in this Handbook. Some specific procedures are described in the next section.

Regardless of how its done, however, the number and kinds of people to involve must be decided. This is a sampling problem and will obviously vary from district to district depending on size and number of attendance centers. Some general guidelines for selection of students, staff, and parents are:

* The group must be large enough so that you're sure their views accurately represent those who are not involved. Very simply, involve enough students so you can be sure you're getting the student point of view. Ditto for staff and parents.

* You probably can't have too much confidence in information gathered from a group of less than thirty (30).

* Everyone must have the same chance of being included as everyone else. That is to say, participants should be chosen at random.

* To make sure that all subgroups within a response group are represented, determine what percentage the subgroup is of the total group and randomly select that number of subgroup members in your samples. For example, assume you have a 400 student high school which includes 40 Indian students (10%). Further assume that you have decided on a 25 percent random sample (100 students). Ten (10) of the students included in your sample should be Indian and they should be randomly selected from the total group of 40 Indian students.

Do a Needs Assessment

Now that you've involved students, staff, and community in identifying goals for your district - where you want to be - the next step is to find out where you are now in relation to the goals. What do your students currently know, feel, believe, think - how well are they currently achieving the goals? This procedure is a needs assessment; an attempt to find the gaps, discrepancies (needs) between where you want to be and where you are now. The bigger the gap, the bigger the need and big gaps suggest areas of program change and improvement.

As an example, assume the following:

GOAL: Students should learn how to manage time, money, and property.

Gap, discrepancy - need

WHERE YOU ARE NOW: Evidence that students do not understand interest rates and installment buying.

This gap, need, might suggest changes in a variety of school programs (math, home economics, vocational agriculture, social studies) or it could suggest a new course or program in consumer education. The solutions or program changes which are made should be locally determined and reflect the best judgment of local practitioners in light of available resources, staff capabilities, community attitudes, etc. This does not rule out adopting someone else's program or package but this should be a local judgment.

You've probably guessed by now that a needs assessment requires some measurement to find out where students currently are relative to the goals which have been set. And obviously, if you're going to measure something you've got to decide who will be measured. A sampling of students is needed - perhaps the same ones who were involved in establishing goals. Or you might wish to measure way down in the elementary grades and you can do this if you use the right measuring instruments.

Measuring Need: Three Alternatives

Let's look at some alternative ways we might measure need - where students currently are in relation to a goal. And to be consistent, let's use the goal statement mentioned earlier in this section in our illustrations.

Option One: Use Existing Instruments

Assume that your planning team decides to use existing instruments to measure how students currently perform relative to goals. They examine two instruments - the Test of Economic Understanding and the Consumer Education Test. They decide to use the latter because it measures students' knowledge and understanding of credit, money management, savings and investment, and insurance. These seem to be logical dimensions of being a good manager of time, money, and property. Since this instrument is geared for use with secondary students, a random sample of high school students is selected and administered the instrument. The results show what students know about

these aspects of money management. They may know a little or they may know a lot. If they know a little, the gap is big and there is a need; if they know a lot, the gap is small and you can assume that your program is already doing a good job relative to this goal. Simple, huh?

Option Two: Develop Your Own Measuring Instruments Locally

Your planning team might feel that the instruments they examine don't quite get at what they'd like to know about students' money management skills and could decide to develop local measuring instruments. Fine. The planning team might do it or appoint a task force of appropriate professional staff members and perhaps some secondary students and community members (like the banker, insurance agent, credit manager, etc.) to develop an instrument.

Two items of the type which might logically appear in such an instrument are:

1. You want to borrow $1,000 and will pay it back within one year by making 12 equal payments. Which of the following ways of figuring interest will mean the least actual interest cost to you?

   a. The bank gives you $1,000 less 6 percent, or $940. You pay back $1,000 over the 12 months.

   b. The bank gives you $1,000. You pay back $1,000 plus 6 percent or $1,060 over the 12 months.

   c. The bank gives you $1,000. You repay the $1,000 plus a flat charge of $75 over the 12 months.

   d. The bank gives you $1,000. Each month the bank figures interest at 1/2 percent per month on the balance still owed. This is equivalent to an annual rate of 6 percent.

2. From a bank you borrow $300 which you agree to pay back by making a payment of $26.50 each month for a year. At the end of 12 months the loan plus interest will be paid. What is the true annual percentage rate of interest charged to you?

   a. About 6 percent

   b. About 12 percent

   c. About 18 percent

   d. About 24 percent

Administering an instrument incorporating these kind of items to an adequate sample of students would certainly provide an indication of need concerning the goal in question.

Option Three: Ask Students What They Know

Another approach might be to ask a sample of students what they know about the various factors the planning team (and/or an appropriate task force) feels are indicators or characteristics of intelligent money management behavior. Some questions which might logically appear in an instrument of this type are:

For each of the questions below, circle the answer which best describes your level of understanding.

1. What do you know about the relative benefits of saving in a bank as opposed to a savings and loan association?

   Almost nothing A little Quite a Bit A lot

2. What do you know about how to do comparative shopping?

   Almost nothing A little Quite a Bit A lot

A Word of Caution...

Three different ways to measure where students currently are in relation to important goals - determining needs - have been described. There are no doubt other procedures which could be used and these examples

are by no means inclusive. The district should choose the needs assessment procedure which is most compatible with its own wishes, resources, etc.

It is important to do this phase, however. Many people confuse goals with needs and assume that once you have goals you can go directly to the next phase of the planning process - program modification and development. If you don't do a needs assessment, you really don't know the strengths and weaknesses of your current program relative to goals and really don't know where you ought to be concentrating your time and resources for program improvement.

Needs assessment is perhaps the most neglected phase in the planning process. Don't you neglect it! If you do, you really don't know where you are and this makes it awfully hard to get where you want to go.

Develop Program and Instructional Objectives

Well, where are we? Now you've established goals (determined where you want to go) and done a needs assessment (determined where you are now). The next step is to organize to apply these kinds of information to program changes and improvement. More specifically, the planning team now needs to determine how to organize people to set program and instructional objectives designed to meet the needs (reduce the gaps) which have been identified. To do this you need to know:

* The nature of program and instructional objectives and how they relate to goals.

* Different ways of organizing people to develop program and instructional objectives which can meet needs and thus contribute to goal achievement.

Let's begin with first things first; the nature of goals, program and instructional objectives, and how they relate. To clarify these terms and their

relationships, let's use the goal statement we've used earlier having to do with time, money, and property management.

Goals

As I hopefully pointed out earlier, a goal is a very broad statement of intent, an ideal state of being, valued kinds of proficiencies and competencies to be achieved. Some examples of educational goal statements, including the one we've dealt with earlier, are:

* Students should learn how to manage time, money and property.
* Education should provide each person with understanding and acceptance of individuals or groups belonging to diverse cultures.
* The school program should help every learner to acquire those skills, knowledges, and attitudes required for independent, autonomous learning.

Beautiful statements aren't they, and very difficult to disagree with. Note that they are all very broad, do not mention any time frame or conditions, and are really too general to suggest directions for program change and improvement. We've got to sharpen up these goal statements; make them somewhat more specific to be helpful in this regard. We've got to derive program and instructional objectives from them!

Before we do this, notice the subtle differences between the first and last goals listed above. The first one identifies some things we want students to know and do as a result of being in school. We might call this an <u>outcome</u> or a <u>product</u> goal. In contrast, the last statement suggests that the school needs to do something in order to ensure desirable student outcomes; that it perhaps needs to organize and staff in certain ways or should provide certain

kinds of activities and experiences for students. We might logically call this a process goal. For school district program planning it is preferable to establish and prioritize product goals - statements of desirable student characteristics as a result of being in school.

Program Objectives

A program objective is more specific than a goal, derives logically from it, and identifies skills and competencies in particular disciplines (programs) required for the achievement of a goal. Quite a mouthful. Let's simplify it some.

Assume that the Language Arts program can contribute to achieving the goal having to do with intelligent money management. The question then becomes: What are some skills and competencies the Language Arts program can develop in students which can help reach this goal? A couple of feasible program objectives flowing logically from this question are:

* Students will be able to read advertisements of lending institutions critically and analytically.
* Students will be able to read and understand newspaper stock exchange reports.

Nice objectives. Somewhat more specific than the goal statement from which they derive. And they're beginning to provide a few hints as to some of the content and experiences the Language Arts program ought to include.

But we still need to sharpen things up a bit more. What do we mean by to "read critically and analytically?"; to "read and understand?" We can specify exactly what we mean in the form of instructional objectives.

Instructional Objectives

Very simply, an instructional objective specifies what the student is to know, be able to do as a consequence of instruction, the important conditions

under which he will perform, and the level of acceptable performance.

Pushing our illustration further, some specific Language Arts instructional objectives of a course or grade level relative to the money management goal might well be:

* Given a daily newspaper the student will be able to interpret the stock transactions on the financial page with 90 percent accuracy.

* After viewing television advertisements of a bank and a savings and loan association, the student will be able to identify correctly which of the institutions offers him the greatest potential benefits in these aspects of a savings program:

  Effective interest rate

  Protection against institutional bankruptcy

  Penalties for withdrawal, if any

  Ease of making transactions

  Ease of accounting and reporting

Let's review what we've done. We've taken a very broad goal having to do with money management, sharpened it up some in the form of program objectives for Language Arts, and specified very clearly in the form of instructional objectives what we expect students to be able to do in Language Arts as evidence that the goal is being achieved. We've gone from the general to the specific in one program relative to one goal. Simultaneously the same thing is occurring in all programs relative to all priority goals and the result is a set of program and instructional objectives which, if achieved, gives evidence the school district's goals are also being achieved.

Organizing to Develop Program and Instructional Objectives

Who does all of this? The obvious answer is the professional staff although involving students and lay persons might well generate objectives (as well as programs) which educators in isolation might not contemplate.

Some alternative ways to organize staff to translate priority goals and assessed needs into program and instructional objectives are:

* K-12 subject matter (program) teams
* Grade level subject matter teams
* School level subject matter teams (El., J.H., S.H.)
* Interdisciplinary school level teams
* Interdisciplinary grade level teams

Subject matter teams provide good vertical articulation within each discipline but don't do much for interdisciplinary articulation. On the other hand, the interdisciplinary approach to team organization gets the different disciplines together but does very little for vertical articulation within subject areas. Perhaps the "best" pattern for any school district is that which reflects past and current curriculum development procedures, district organizational patterns for instruction, preferences of the professional staff, and that which seems most compatible with the desired outcomes of long range planning. It is likely that both horizontal and vertical articulation can be achieved through careful structuring of the district planning team.

Develop Program Alternatives and Improvements

Up to this point you've established goals, conducted a needs assessment, developed program and instructional objectives, and organized the professional staff to get from goals to program modifications. Now that all of this has been accomplished, the next question you've got to deal with is:

> What program modifications should we make to better meet the goals, needs, and objectives we have established?

Closely related to this question is another:

> Who develops and suggests program modifications?

The obvious answer to the latter question is that this is an activity for the professional staff. Once again, however, involving students and lay

persons in this phase of the planning process might well generate some truly innovative program suggestions that educators in isolation might not think about. Let's face it. We all wear professional blinders and involving the community in this phase could well broaden the scope of the educational program to incorporate the total community and all of its people, physical, cultural, social, and economic resources.

Logically, the teams which were organized to develop program and instructional objectives should develop and suggest program modifications designed to meet the objectives. Again, questions of vertical and horizontal articulation must be considered and perhaps both of these can be approached by carefully structuring the district planning team.

A whole myriad of program modifications is possible and this paper obviously cannot adequately deal with all of them. Changes can take a number of forms, however, and some of the more obvious ones are:

* Course deletions or additions
* Changing content within existing courses
* Different staffing patterns
* Program and schedule changes such as individualized instruction and flexible modular scheduling
* The addition of mini-courses
* A total reorganization of program along other than subject matter lines
* Different methods of instruction

As an illustration, let's go back to the money management goal we've discussed earlier and specifically to the Language Arts instructional objectives we derived from that goal. You'll recall that the two instructional objectives had to do with:

* Interpretation of newspaper financial page stock transactions

* Determining comparative savings benefits of banks and savings and loan associations

Some logical and feasible alternative changes in the Language Arts program to better meet the first of these objectives might be:

* Introduction of a high school course entitled "Consumer Literature."

* Introduction of a unit on the stock market in the "Readings on Contemporary Social Problems" course.

* Asking a local stock broker to meet with all sections of the "Critical Reading" course to discuss the financial page and its interpretation.

* Reading and discussion of the financial page in all high school literature courses.

As you can see the possibilities are almost limitless and depend largely on the creativity of the professional staff and the kinds and amount of available local resources. Some factors to keep in mind which strongly influence the kinds of program changes that are feasible and likely successful are:

* The availability of resources to adequately support proposed changes

* The expertise and predispositions of the professional staff

* Whether or not proposed changes square with community values, attitudes, and norms

* The availability of adequate physical facilities

* State and federal laws and regulations which influence local operation

You've probably caught on by now that program improvements ought to be locally determined and geared to local goals and needs. After all, one

of the intended outcomes of local district planning is to develop a highly effective program to achieve local goals and needs. However, this doesn't rule out looking around at what's happening elsewhere and plugging in those things that are compatible with what you're trying to do. There's no sense re-inventing the wheel but what you borrow from elsewhere should logically relate to your own goals, needs, and program development efforts. For the last decade or two, educators have been reaching out, grabbing existing packages, and plugging them into their own system - often without even asking "Why?" "To what end?" Planning allows you to make some,rational judgments about the potential worth of incorporating innovations from elsewhere in terms of what they can contribute to achieving your own goals and needs.

There are some innovations out there which can be useful to you, however, and might well be worthy of consideration by your staff. Some of the more widely known and supposedly most effective ones are:

* Team Teaching
* Student performance contracts
* Individually prescribed instruction
* Non-graded schools
* The open classroom
* Differentiated staffing
* Flexible scheduling
* Programmed learning
* Micro-teaching
* Mini-courses
* Parent-assisted teaching programs
* Classroom management techniques

* Student testing and measurement

* Use of audio-visual media

* Supplemental classroom materials

* Student internships and field experiences

A Word of Caution...

Planning takes a great deal of time and effort and there must be total commitment by all parties to the process. It's fairly simple to identify goals and assess needs but moving on to developing program and instructional objectives and making program changes is a long term, complex process. The professional staff especially is very deeply involved in time consuming activities which should not "be taken out of their hides" so to speak. Time and resources must be provided to do the job adequately.

Obviously there are statutory constraints as well as policies, rules and regulations of the State Board of Education which must be respected. Respecting these constraints, some school districts have provided time and resources for planning activities by adopting some or all of the following practices:

* Periodically releasing students an hour or two early to provide time for staff planning activities.

* Adopting a school calendar with a specified number of days for in-service and program development activities

* Utilizing existing preparation periods for systematic planning activities.

* Releasing staff members for planning through the judicious use of substitute teachers.

* Adopting a salary schedule which supports summer staff planning and program development activities.

The important point is that certainly there are constraints to finding time and resources for planning. Some school districts are finding ways,

however, and it is likely that support will be provided for planning and other accountability procedures as they become the norm.

Implement Selected Program Alternatives and Modifications

Now that you've developed some program alternatives and modifications you think can help reach goals, needs and objectives, the next step is to put some of them into practice and see how they work. Some are no doubt "more likely" than others in the sense that you have adequate resources, they're not overly wild-eyed or radical, and they seem more apt to reach goals and objectives than do some others. These are probably the ones you'll choose to implement.

But implementing something new and different implies change and although we've been talking about program planning and change, we really want people-students, teachers, administrators - to do some things differently. Thus program change is in reality people change and people tend to be remarkably skillful in resisting and subverting proposed changes in their behavior. So maybe we need to take a very brief look at why people resist change and when they tend to be most receptive and supportive. The implications for program planning and development should be obvious.

People Resist Change

People tend to resist change because:

* We're all creatures of habit and like to maintain comfortable ways of doing things.
* We like the security of feeling competent that doing things in certain ways affords us.
* We tend to persist in doing things in ways which have been successful for us in the past.
* Our perception of ourselves may be threatened by the suggested new way of doing things.

* We need the support, acceptance, and prestige afforded by friends and colleagues. Doing things differently can often threaten these rewards.

* We feel just plain incompetent to do things differently and are often afraid to try.

* Change implies that the ways we're doing things now aren't very effective.

Wow! For these and a variety of other reasons you can perhaps identify people tend to resist change. Obviously this phenomenon complicates the planning process - especially at the implementation stage.

People Can Support and Welcome Change

But fortunately all is not lost. People can be receptive to and supportive of change when:

* They see the need for change.

* Their self concept and security needs are not threatened by the proposed change.

* They have been involved from the beginning in the change process.

* Those in formal positions of authority are supportive of change and can reward change - oriented behavior.

* Social support, acceptance, and prestige are enhanced by change - oriented behavior.

* Change is approached on a pilot, experimental basis.

Recalling the suggested procedures for each phase of the planning process described thus far, it seems that conditions supportive of change are present. Note that wide involvement of students, staff, and community in establishing goals and assessing needs has been advocated. Additionally, total staff involvement in developing objectives and program modifications has been suggested. Finally, it has been proposed that the total planning effort be coordinated and directed by a planning team which is representative

of all participant groups. These conditions do not guarantee successful and effective educational planning but it is certainly more likely to occur with, as opposed to without, these characteristics.

Very often the professional staff is resistant because they don't understand the nature of planning, they don't see the need for it, and they take it as implying that what they're currently doing is not particularly effective. Thus in addition to the kinds of involvement suggested throughout the Handbook, a foundation for effective planning must be laid and people must be oriented in ways that deal with these questions:

* What is planning? How does it differ from what we've been doing in curriculum?
* Who needs it? What can it do for the system?
* What can it do for me in my classroom?
* When will I find time to do this in addition to my other activities?
* How do I know that anything will change as a result of planning?

Tough questions all. But they must be answered to obtain the commitment necessary for effective planning. And since planning is essentially people change, you've got to be constantly sensitive to why people change and why they don't.

Monitor Programs and Evaluate Effectiveness

Assume now that some time has passed; time enough for the program changes which have been implemented to take hold. Now you've got the responsibility to see how effective they are; if in fact they're helping students achieve the objectives they were designed to promote. Time to evaluate.

Evaluation, like statistics, is a term which frightens many of us but really it is just a procedure for finding out how far we've progressed toward where we want to be and to afford better decisions as to how to get there. And in educational program planning, where we want to be is expressed in goals and objectives which specify characteristics we'd like students to have and things we'd like them to be able to do. So evaluation involves measuring student performance in relation to specific program and instructional objectives.

In fact, when you developed objectives, you were already suggesting the means for evaluating their accomplishment. Thinking back again to the Language Arts objective having to do with interpreting the financial page with 90 percent accuracy, you were necessarily implying that somewhere down the road you'd have to find out if students can in fact exhibit this skill. Now's the time to find out.

You might measure all students who are supposed to have this skill or you might measure a random sample. You might want to measure with some existing instrument, a locally developed instrument, some type of performance test, or you might wish to go way back and use again whatever measurement you used in the needs assessment phase. The kind of measuring sticks you use in evaluation is your choice but they should have been fairly well specified at the time you specified objectives. If not, you're likely to find yourself at some point in time asking the embarrassing question "How do we find out where we are and how well we're doing?"

Although student performance information is the most important kind of data you want to gather through evaluation, there are other indicators of success or failure you need to take a look at. For want of a better term we might call these indicators "staff and student attitudes and behavior." If for instance,

you implement a change like team teaching and faculty morale sinks sharply accompanied by a marked increase in student absenteeism, you perhaps ought to consider another change right now rather than waiting for student performance data which are scheduled to be gathered at some future point in time.

This is to say that programs, once conceived and implemented, should not be frozen in concrete. If they don't seem to be working for one reason or another, modify or shelve them and try something else. Don't feel that you've got to stay with them through the trial period until you see how students perform. Sticking with a poor program prior to student performance evaluation is as bad as throwing out a good program because of shoddy evaluation.

It's essential that evaluation be done properly. An adequate evaluation can help keep you on the right path toward goals and objectives. It can tell you whether or not goals and objectives have been accomplished. In either case, the results of evaluation can serve as the information base for a new round of objectives, programs, and evaluation.

Recycle

I thought for a while we'd never reach this point but we're now at the end of the "Planning - How to Do It" part of the Handbook. And at this point you know all about the nature of planning - from establishing goals and objectives to developing programs and evaluating program effectiveness.

You'll recall that earlier in the Handbook, in a discussion having to do with developing a plan for planning, it was pointed out that the district planning team needs to specify the time period of the planning cycle being initiated - one year? three years? five years? whatever. Let's assume for a moment that your district chose to do rather long range planning, a five year cycle. Planning isn't over at the end of five years. Rather you begin

the process again starting with identifying and prioritizing goals. Assuming that the programs you've implemented in the planning period have been successful, and further assuming changing social, economic, and political conditions, it is perfectly logical that new goals will emerge suggesting the need for additional program changes.

So planning is continuous, ongoing, something that's built into your district operation. It's not something you do for a while and then stop. Rather you go through the phases of the planning process in a specified time period and then start the process again. Doing so can assure a current, relevant educational program for the students of your district at all times. And I suspect we'd all agree that this is a prime professional responsibility of our schools and those who staff them.

Let's now take a look at some specific procedures which might be employed in various phases of the planning process.

PLANNING: WHAT ARE SOME PROCEDURES?

Actually, more specificity than originally intended was provided in the previous section of the Handbook. Alternative needs assessment options were suggested and illustrated. Clear definitions of goals, program and instructional objectives were put forth along with examples of each and how they relate. Suggestions relative to who should be involved and how in each step of the planning process were made.

In the name of brevity and with the need to preserve the sanity of both author and readers, this section will deal only with some alternative ways of establishing goals. Three (3) specific methods will be described as to:

* Who's involved
* Procedures
* What the method yields
* Whom to contact

In the reference section of the Handbook, the best sources of which the writer is aware are included for this and the other phases of the planning process.

Establishing Goals: The Phi Delta Kappa Model

Who's Involved

The Phi Delta Kappa Model involves

* Students
* Community
* Professional staff

in prioritizing school district goals.

Procedures

This is accomplished in two face to face sessions of approximately three hours each in which participants go through a specified series of steps to rank pre-existing goal statements. These steps are:

* Participants individually rank goal statements as to importance.

* Participants form small homogeneous groups and develop for each goal:

  A group average importance score
  A group consensus importance score

* Participants individually rank goal statements as to achievement and effort.

* Participants form small heterogeneous groups to reconcile differences in goal rankings among staff, students, and community.

Outcomes

The Phi Delta Kappa Model provides:

* A ranking of pre-existing goal statements by staff, students, and community.

* A consensus ranking of goal statements derived from the heterogeneous group reconciliation procedure.

Contacts

* Phi Delta Kappa Planning Commission:

Phi Delta Kappa
8th and Union
Bloomington, Indiana 47401

* A modified version of the PDK model is available from the author at:

Kansas State Department of Education
120 East Tenth Street
Topeka, Kansas 66612

Establishing Goals: The Modified QEPS Model

The Quality Education Program Study (QEPS) was initiated in the State of Pennsylvania in 1963. The study used very systematic and elaborate procedures to establish ten (10) inclusive goals for Pennsylvania schools. An additional output of the study has been an educational product evaluation model for use in local school districts. This model is essentially a planning system which takes a district's professional staff members through the following steps:

* Identification of areas of concern.

* Translation of areas of concern to perceived needs.

* Translation of perceived needs to goal statements.

* Generation of hypotheses in the form of predicted student behavioral changes if goals are achieved.

* Identification of objectives by subject area derived from goal statements.

* Identification of procedures to test hypotheses; evaluation instruments to measure hypothesized student behaviors.

* Identification of alternative teaching strategies within the existing program structure to facilitate goal and objective attainment.

The writer has modified certain portions of this model with the specific intent of developing a goal prioritizing procedure which differs somewhat from the Phi Delta Kappa procedure described above. Its essential features follow.

Who's Involved

The modified QEPS model involves

* Students
* Community
* Professional staff

in generating educational concerns, categorizing them, assigning concerns to existing goal statements, and reporting the number of concerns assigned to each goal statement.

Procedures

This is accomplished in one face to face session of approximately three hours in which:

* Participants are placed in small heterogeneous groups of 6 - 12 persons.

* Each group generates a specified number of concerns (usually 10 - 15) it has for the improvement of the district's educational program.

* Each group classifies the concerns it has identified into one of four categories:

  Learner
  Program
  Staff
  Board/Community

* Each group assigns its learner concerns to the appropriate QEPS goal statement.

* Each group tallies the number of learner concerns it has assigned to each goal statement.

* Each group reports its tally and a composite tally for each goal statement is computed.

Outcomes

The modified QEPS model provides:

* An inclusive list of educational concerns generated by students, staff, and community

* A categorization of these concerns into learner (desired student behaviors) and others which are in actuality proposed changes and solutions

* A list of goals ranked in their order of importance on the basis of the number of learner concerns assigned to each

Contacts

* QEPS Product Evaluation and Planning Model:

  Dr. Raymond Bernabei
  Division of Curriculum and Instruction
  Bucks County Public Schools
  Doylestown, Pennsylvania 18901

* Modified QEPS Goal Prioritizing Model:

  Dr. Joseph A. Sarthory
  Kansas State Department of Education
  120 East Tenth Street
  Topeka, Kansas 66612

Establishing Goals: The School Image Descriptive Questionnaire (SIDQ)

The School Image Descriptive Questionnaire (SIDQ) is a short easily administered instrument which is used to record the "image" that teachers, students, parents, and the principal report for a school. The basic domains measured by the SIDQ include:

* The goals of the school

* The behavior of students, parents, teachers, and the principal associated with school operations

* Priorities for innovative educational programs

The SIDQ provides an objective and systematic overview of the basic school operations associated with learning, teaching and school leadership.

In addition to a concise and accurate description of the basic operations of the school, the SIDQ includes an assignment of goal priorities for the school, as well as an identification of the innovations which have high value to teachers and the principal. Thus, a principal may determine if school operations are congruent with goals of the school, as well as identify innovative programs which have a high probability of satisfying the educational needs of the school.[2]

Who's Involved

The SIDQ gathers information from

* Parents
* Students
* Teachers
* Administrators
* Other community representatives

on the following dimensions of school operation:

* Student goals
* Student performance
* Teaching philosophy
* Interest in innovation
* Parent participation
* School climate

Procedures

* Random samples of students, parents, and professional staff members are identified.
* The SIDQ is administered to identified samples in each attendance center.
* Parents and other community members are surveyed by mail.

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[2]From a description of the SIDQ by Dor B. Croft.

* Questionnaires are scored for each respondent group for each attendance center.

* The data are fed back to each building principal for use in program development and improvement activities.

Outcomes

The SIDQ provides:

A profile for each attendance center of parent, student, and staff perceptions of:

* Student goals
* Student performance
* Teaching philosophy
* Interest in innovation
* Parent participation
* School climate

Contact

Dr. Don B. Croft
Educational Research Services
2010 Corley Avenue
Las Cruces, New Mexico 88001

The SIDQ, in addition to establishing goals, provides information about aspects of school operation which can help or hinder their achievement. The prevailing teaching philosophy, what teachers know about and their interest in alternative ways of doing things, and the general view of a school building as a friendly, open place or a tense, closed place likely affect the ability of a school to reach its goals. Additionally, these kinds of information can suggest appropriate changes in teaching methods, student - faculty relationships, and can even hint at needed in-service activities. In these ways, the SIDQ goes beyond most other goal prioritizing models which are available and affords some diagnosis and prescription.

Conclusion

There are a lot of different ways to establish goals and the methods

described above are by no means inclusive. They are representative of the prevailing types of such procedures that are available however. Some factors which differentiate types are:

* Reacting to existing goal statements or generating goals from scratch.
* Involving people face to face or as individual respondents.
* Involving students and lay persons or limiting involvement to professional educators.

Certainly a great deal is happening nationally in the realm of establishing educational goals and priorities. California has made great strides in response to a variety of legislative directives. Hundreds of California school districts have developed and adopted local goals and have begun the process of program evaluation in light of local goals. A lot of materials have been generated in that state dealing with goal development procedures, management plans for planning, guidelines for involvement of students and lay persons, and the role of the local board in planning. Information and materials in these areas can be obtained from the California School Boards Association in Sacramento.

PLANNING: WHY DOES IT FAIL?

You've probably concluded by now that planning is a pretty sophisticated procedure requiring a great deal of commitment and cooperation. And you're right! When these ingredients aren't included in the proper dosages, planning efforts stand a good chance of failure.

Earlier I pointed out that program planning is in reality people change and noted some of the reasons why people resist change. In a slightly different vein, Steve Knezevich of the University of Wisconsin talks about why planning fails and

suggests a number of reasons. Perhaps we ought to note them here since they so closely resemble earlier comments concerning change and because they serve to reinforce the cooperative involvement theme that has underlied this Handbook.

Why does planning fail? According to Knezevich, planning fails because:

* The nature of planning is not understood (sound familiar?)

* All levels in the system aren't involved (cooperative, district-wide involvement)

* It's not integrated into ongoing operation and management (its kept separate from everything else that's going on)

* Planning responsibility rests solely in a planning department (same as above only worse - all levels have planning responsibility)

* Projections are confused with planning (darned good point).

* Inadequate information (amen)

* Too much is attempted at once (know what you want and can do; don't bite off more than you can chew)

* Plans aren't implemented after they've been developed (plans are nice but they've got to be put into practice to get where you want to go)

* People expect plans to come true as planned (you've got to work at it; plans are road maps and you the traveler make them useful vehicles)

Well, enough said. If you avoid some of these pitfalls and have a good grasp on the nature of planning and what it takes, you've got a good chance to carry it off successfully in your district. Good luck!

EPILOGUE

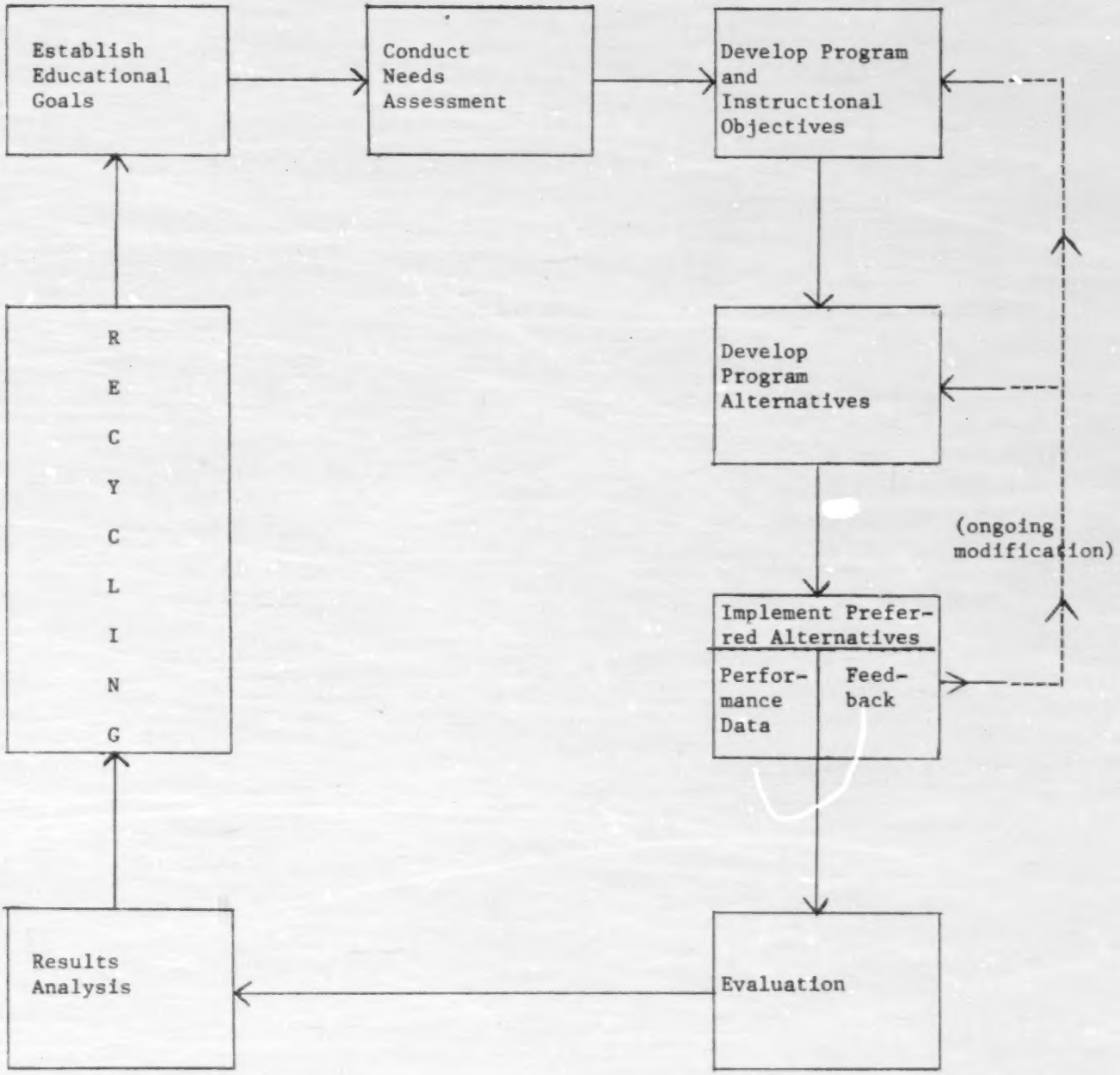
Miracles still happen and we've reached the point where I've accomplished what I set out to do. In order, I've attempted to:

* Describe the nature of planning
* Identify different types of planning
* Point out some potential benefits of planning
* Specify the phases of the planning process
* Discuss implementation at each stage with some description of appropriate alternative procedures
* Point out conditions which can help or hinder successful planning

The synthesis provided in the Handbook is totally a function of my own cognitive processes. Obviously there are other conceptions of the nature of planning and procedures for going about it. What's been described here hangs together and works for me. Hopefully it hangs together for others also and can be of some use to local school district planners.

Rather than making an impassioned plea for planning and once again reciting its virtues, I'll close by using a rather simple schematic to represent the planning process that I've described. The schematic is an adaptation of a planning evaluation model posed by George Redfern which, with minor modifications, seems to capture my perception of the planning cycle.

PLANNING AS I SEE IT
(Adapted from George Redfern)



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This is not an inclusive bibliography. Nor is it intended to be. Rather it is a list of those sources which have been helpful to the author in developing the synthesis described in this Handbook. Hopefully it is organized in such a manner tnat it is of immediate practical benefit to educational planners.

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